Future of Tourism

David Beurle
Founder and
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future→iQ®

Create **Future Intelligence**®
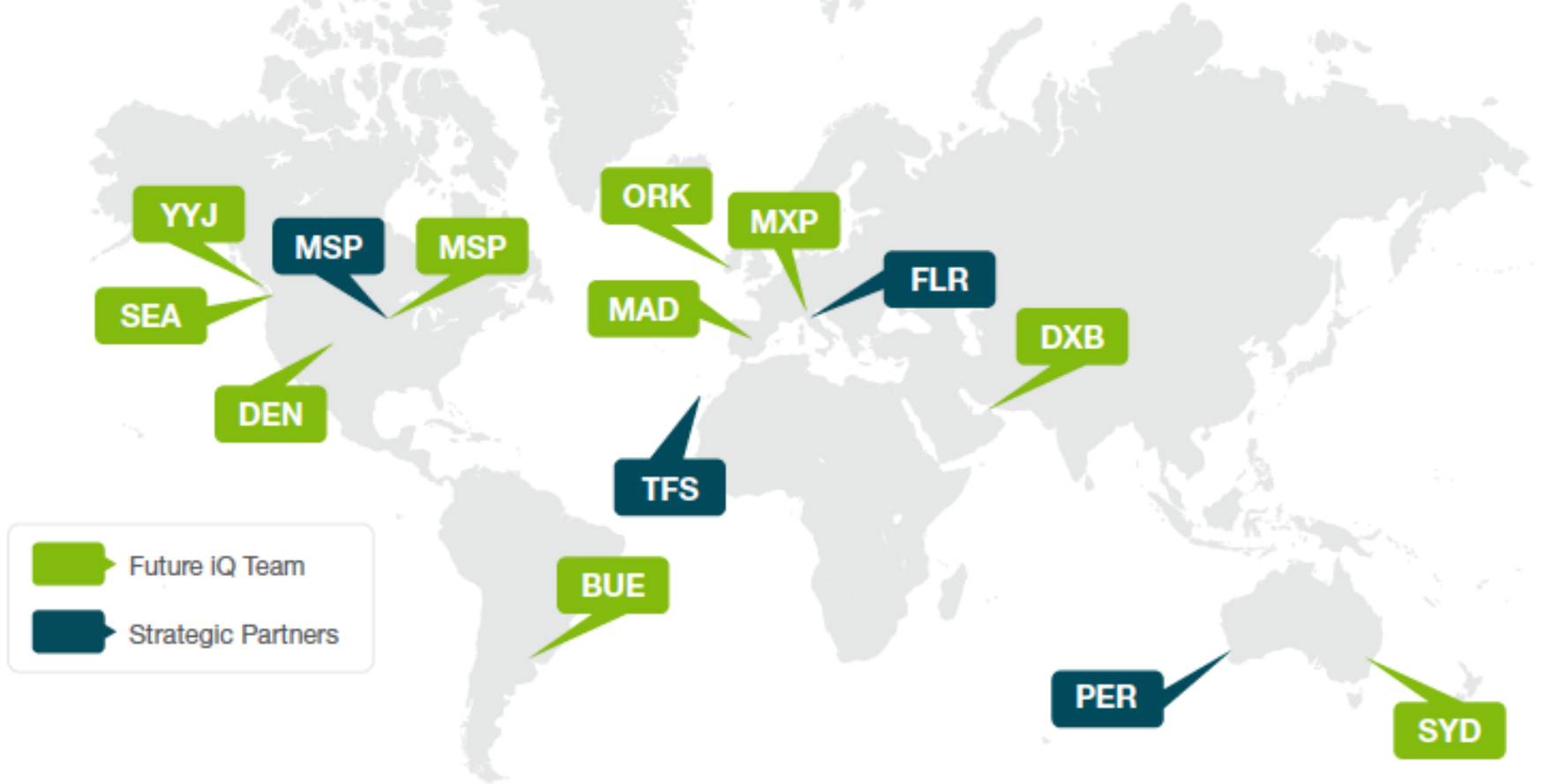
**Global Presence
Local Solutions**
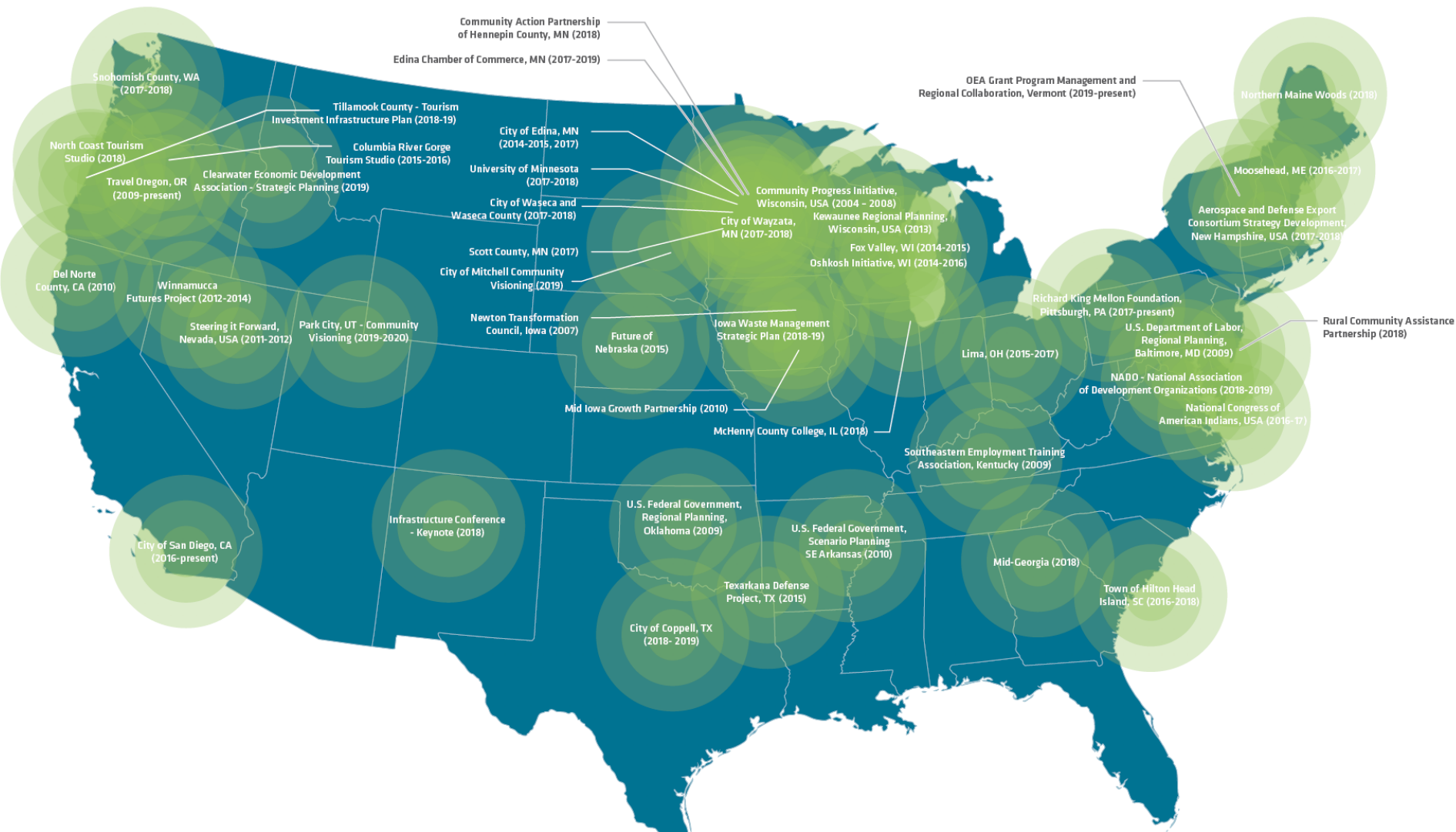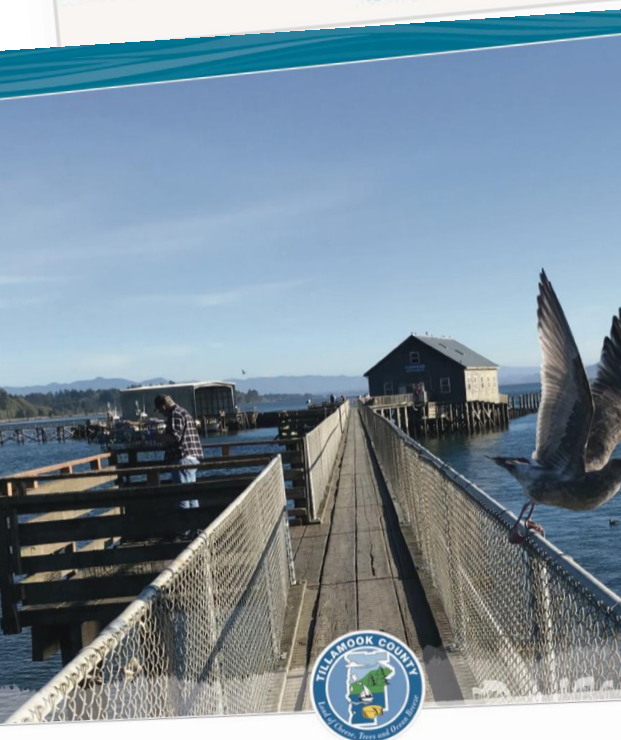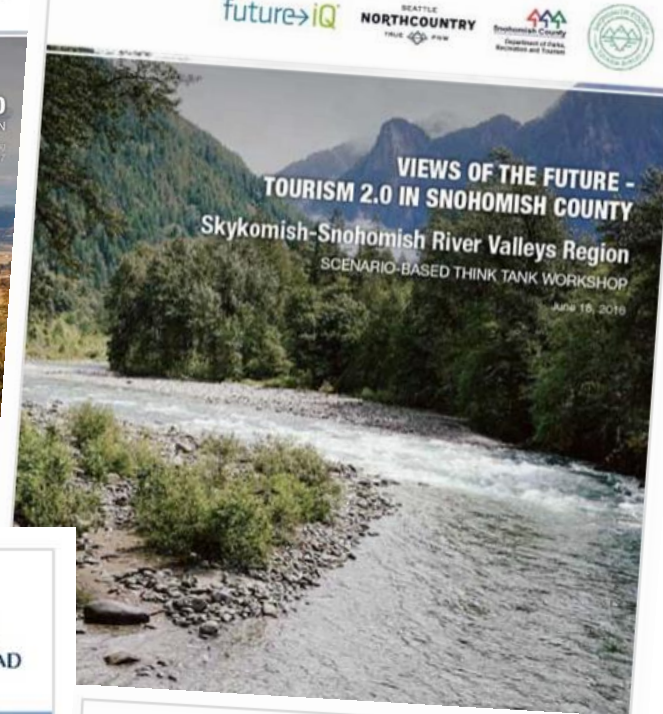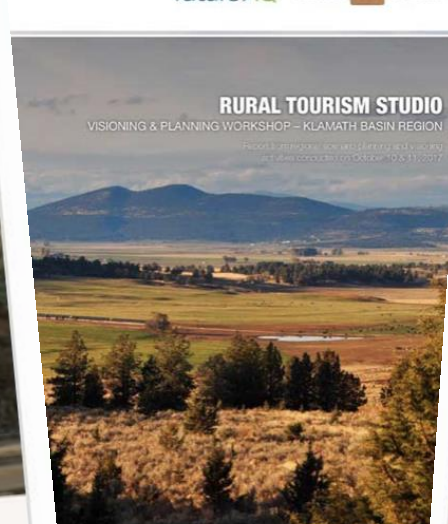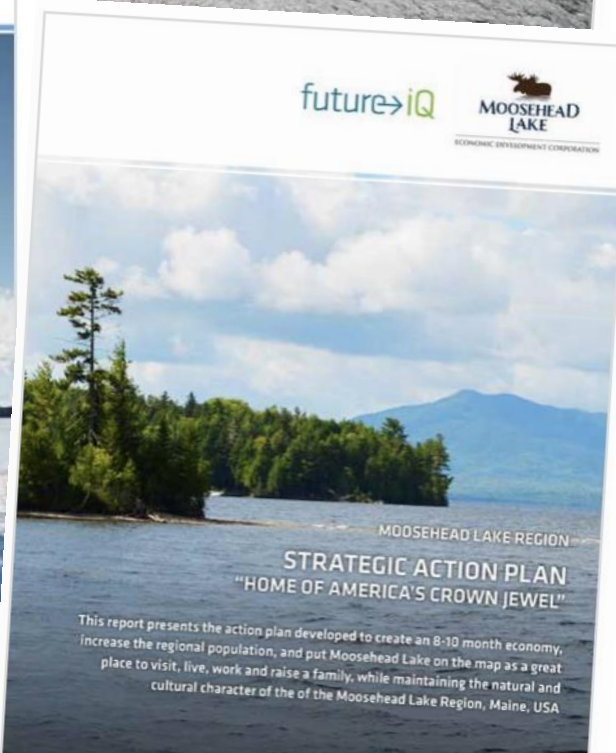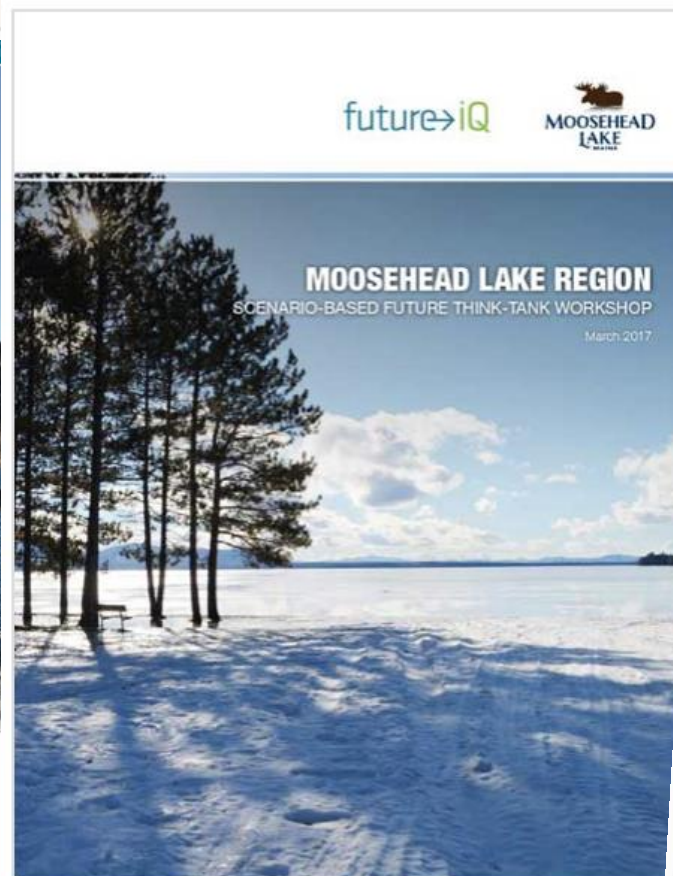
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Current and recent economic development and planning project experience - USA

NORTH COAST TOURISM SUMMIT
Visioning and Planning Think Tank – North Coast Tourism Industry
Posters from the visioning and planning think-tank conducted on 25 September 2018.

TRAVEL OREGON

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RURAL TOURISM STUDIO
VISIONING & PLANNING WORKSHOP – KLAMATH BASIN REGION
Report & interactive session planning and visioning activities conducted on October 10 & 11, 2017

future→iQ   SEATTLE NORTHCOUNTRY TRUE PNW   Snohomish County Department of Parks, Recreation and Tourism

VIEWS OF THE FUTURE –
TOURISM 2.0 IN SNOHOMISH COUNTY
Skykomish-Snohomish River Valleys Region
SCENARIO-BASED THINK TANK WORKSHOP
June 18, 2018

TILLAMOOK COUNTY TOURISM
INVESTMENT STRATEGIC PLAN
TAKING STOCK – WHAT IS KNOWN
March 2019

future→iQ   MOOSEHEAD LAKE MAINE

MOOSEHEAD LAKE REGION
SCENARIO-BASED FUTURE THINK-TANK WORKSHOP
March 2017

future→iQ   MOOSEHEAD LAKE ECONOMIC DEVELOPMENT CORPORATION

MOOSEHEAD LAKE REGION
STRATEGIC ACTION PLAN
"HOME OF AMERICA'S CROWN JEWEL"

This report presents the action plan developed to create an 8-10 month economy, increase the regional population, and put Moosehead Lake on the map as a great place to visit, live, work and raise a family, while maintaining the natural and cultural character of the of the Moosehead Lake Region, Maine, USA

Italian Food Tourism Study Tour

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#FutureiQStudyTour #EatAndLearnItaly

http://www.future-iq.com
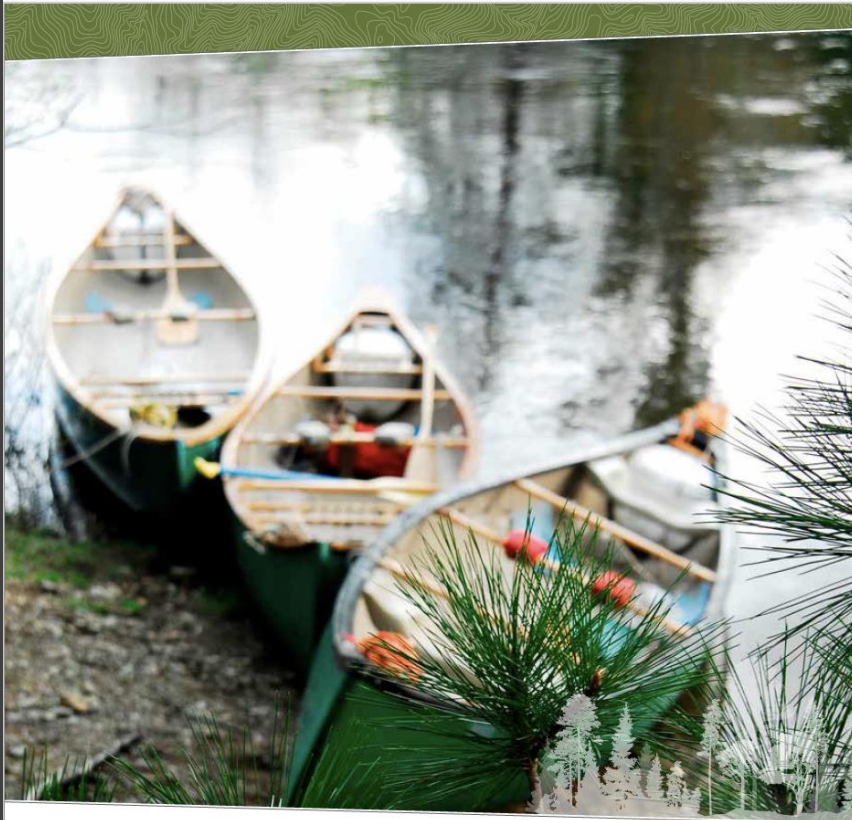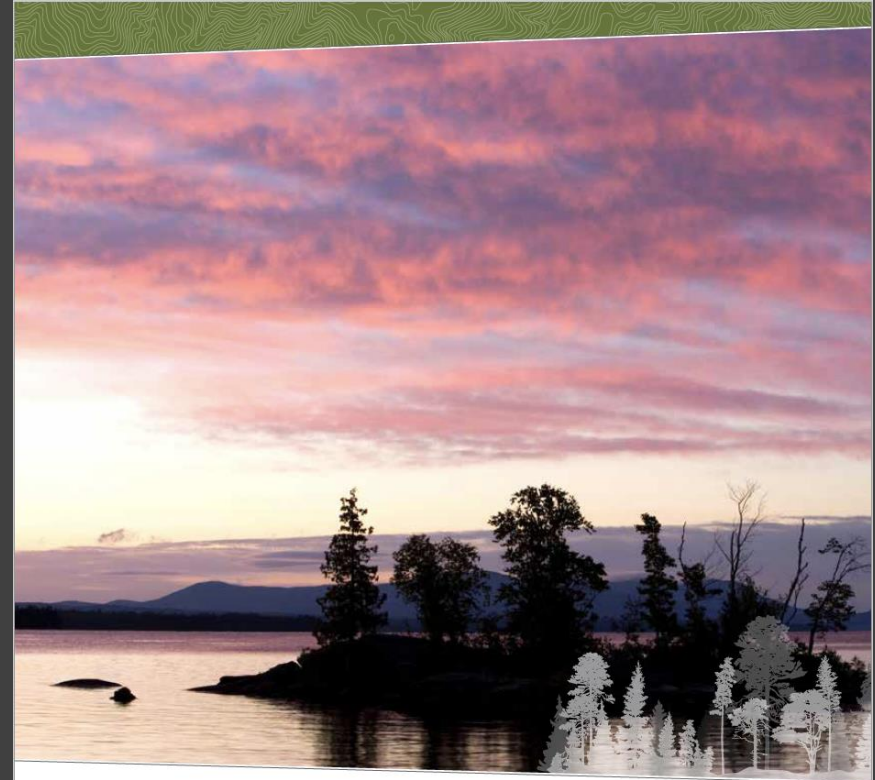
Future of Tourism – The Maine Woods

FUTURE OF TOURISM - THE MAINE WOODS
PART 1: EMERGING TRENDS

A foresight research report examining emerging tourism trends and how they might influence destination development in the Maine Woods Region.

future→iQ **Future of Tourism** – *The Maine Woods. Part 1: Emerging Trends – November 2018*   1

FUTURE OF TOURISM - THE MAINE WOODS
PART 2: POTENTIAL SCENARIOS & IMPACTS

This report provides an analysis of potential future tourism industry development in the Maine Woods Region. It also includes the future scenarios of tourism industry outcomes of the Destination Rally held in Greenville on 17 May 2018, which explored future potential scenarios for tourism development. This report has been prepared by Future iQ as part of the Maine Woods Consortium's rural destination development program.

December 2018

future→iQ **Future of Tourism** - *The Maine Woods. Part 2: Potential Scenarios & Impacts – December 2018*   1

Forces impacting tourism trends in the world (and regions)

What are the emerging macro drivers….

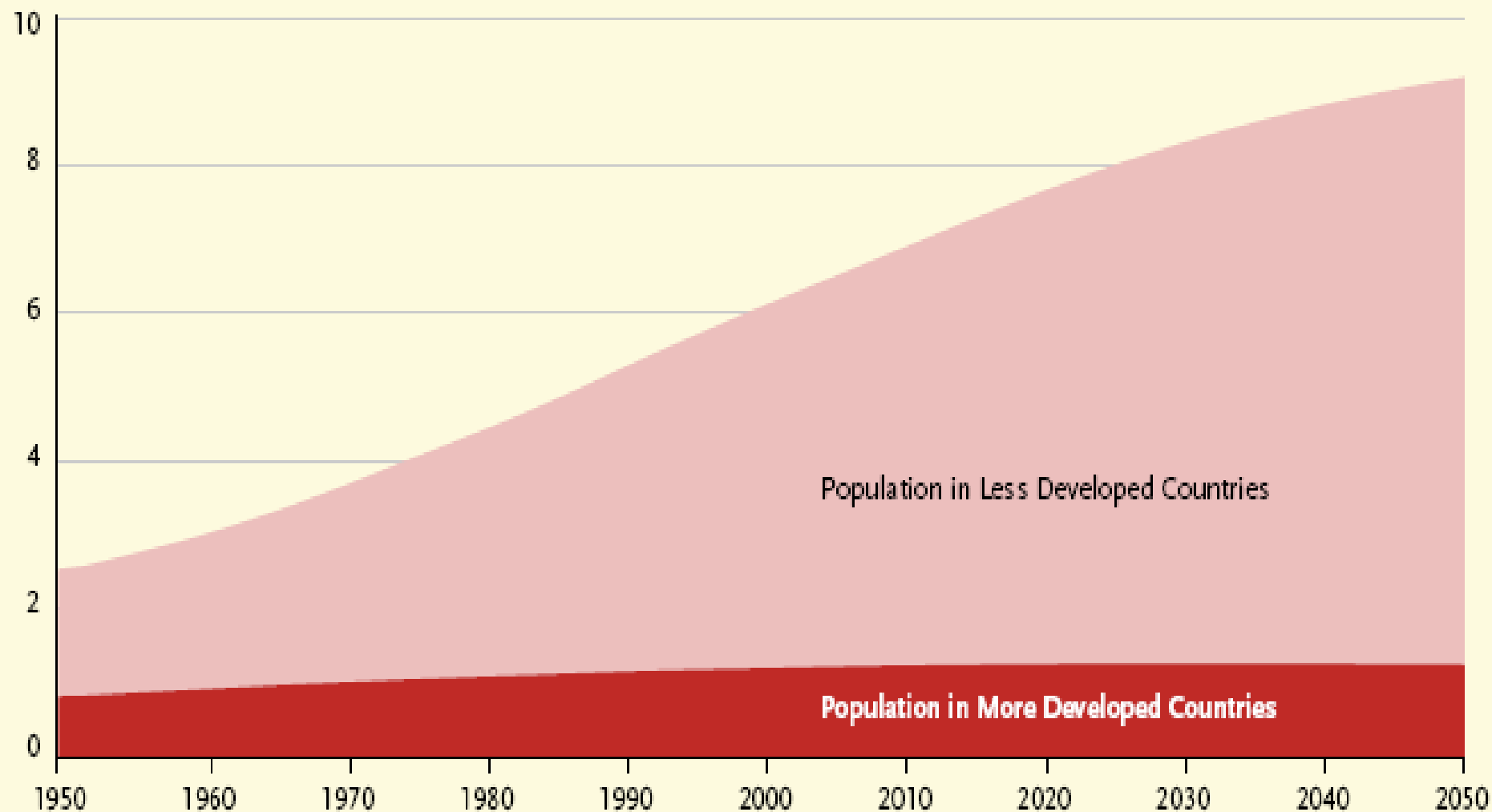# Global Population Growth Is Driven By Developing Countries.

World population in billions, 1950-2050 (projected)

Population in Less Developed Countries

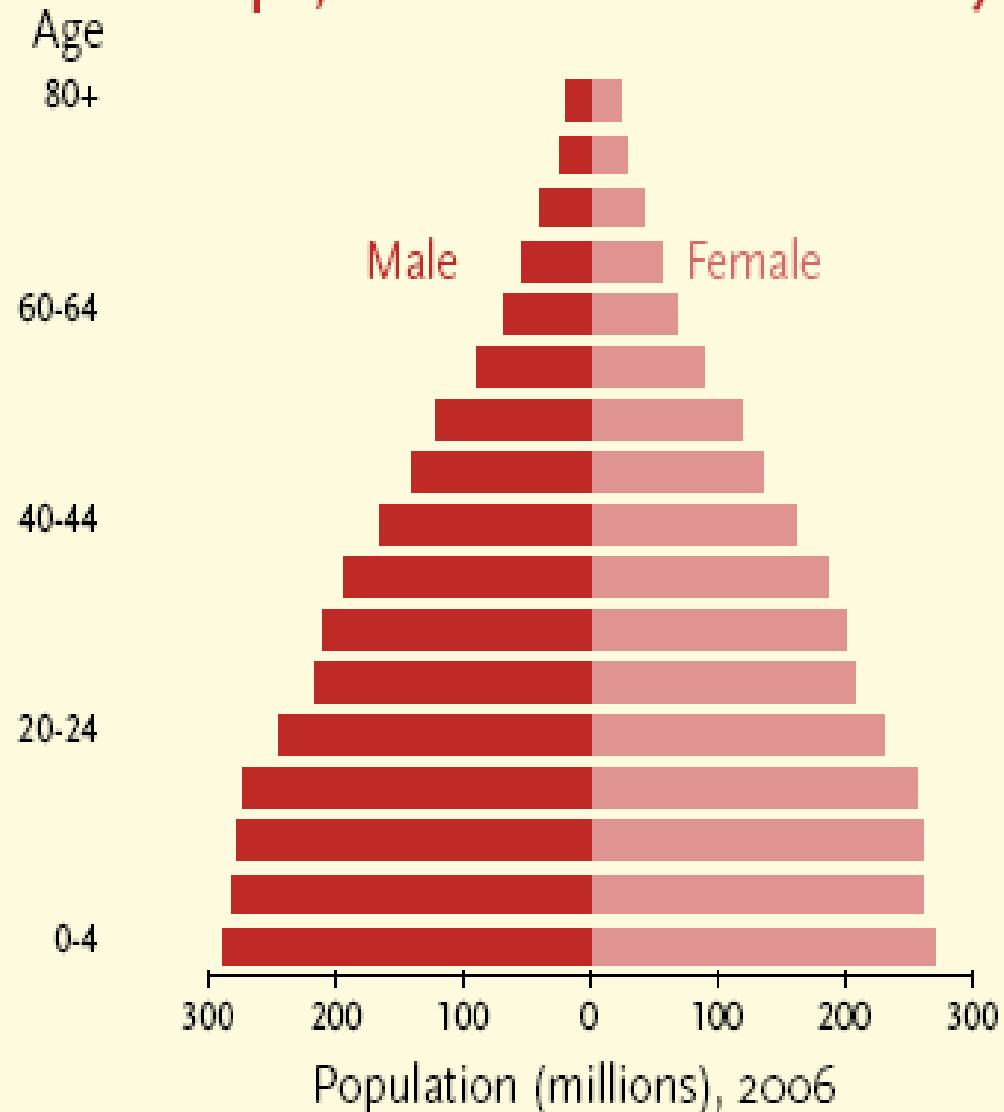Population in More Developed Countries
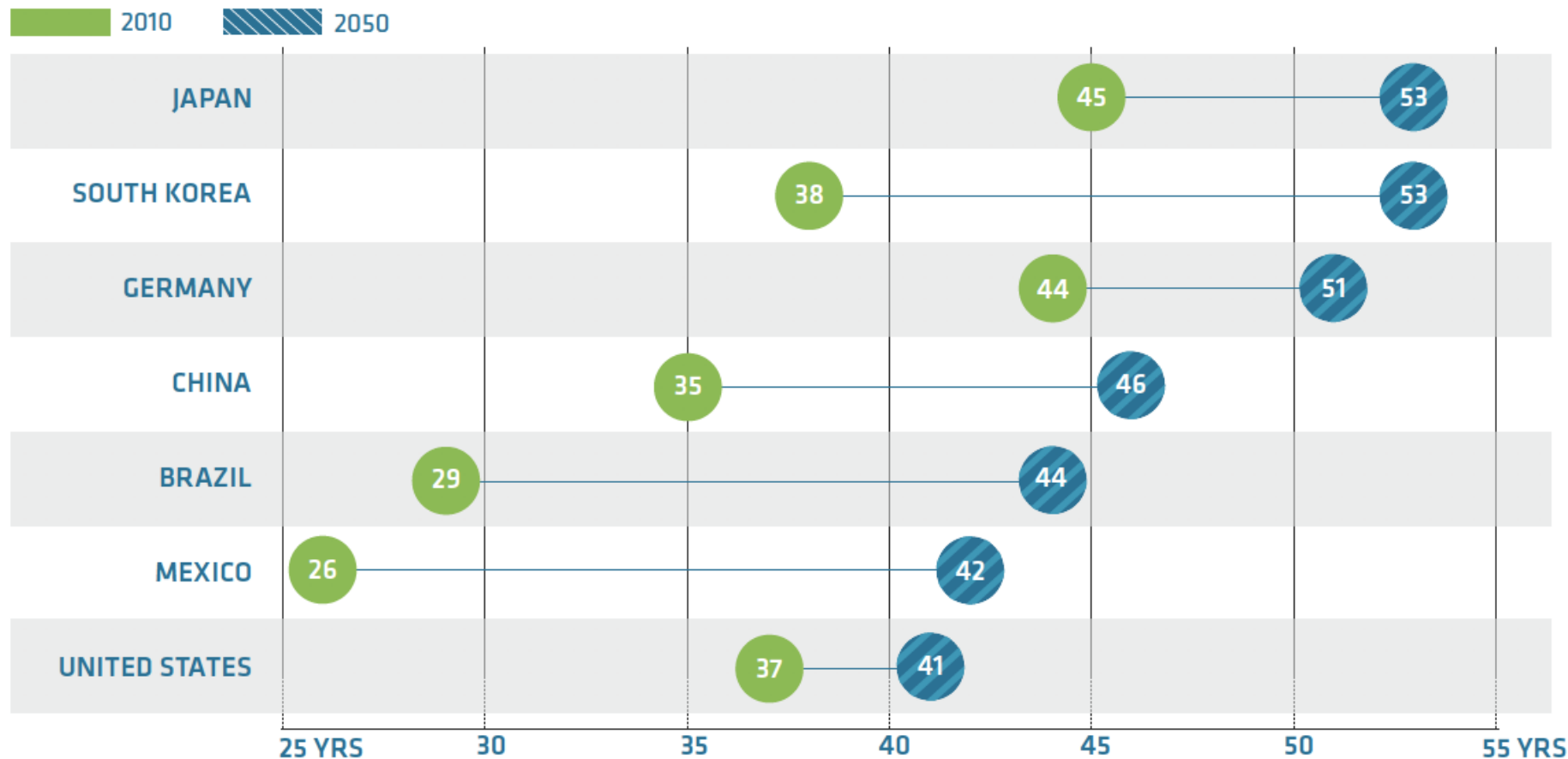
SOURCE: United Nations, *World Population Prospects.*

10

Developed Countries Have Fewer Young People, but a Higher Share of Elderly.
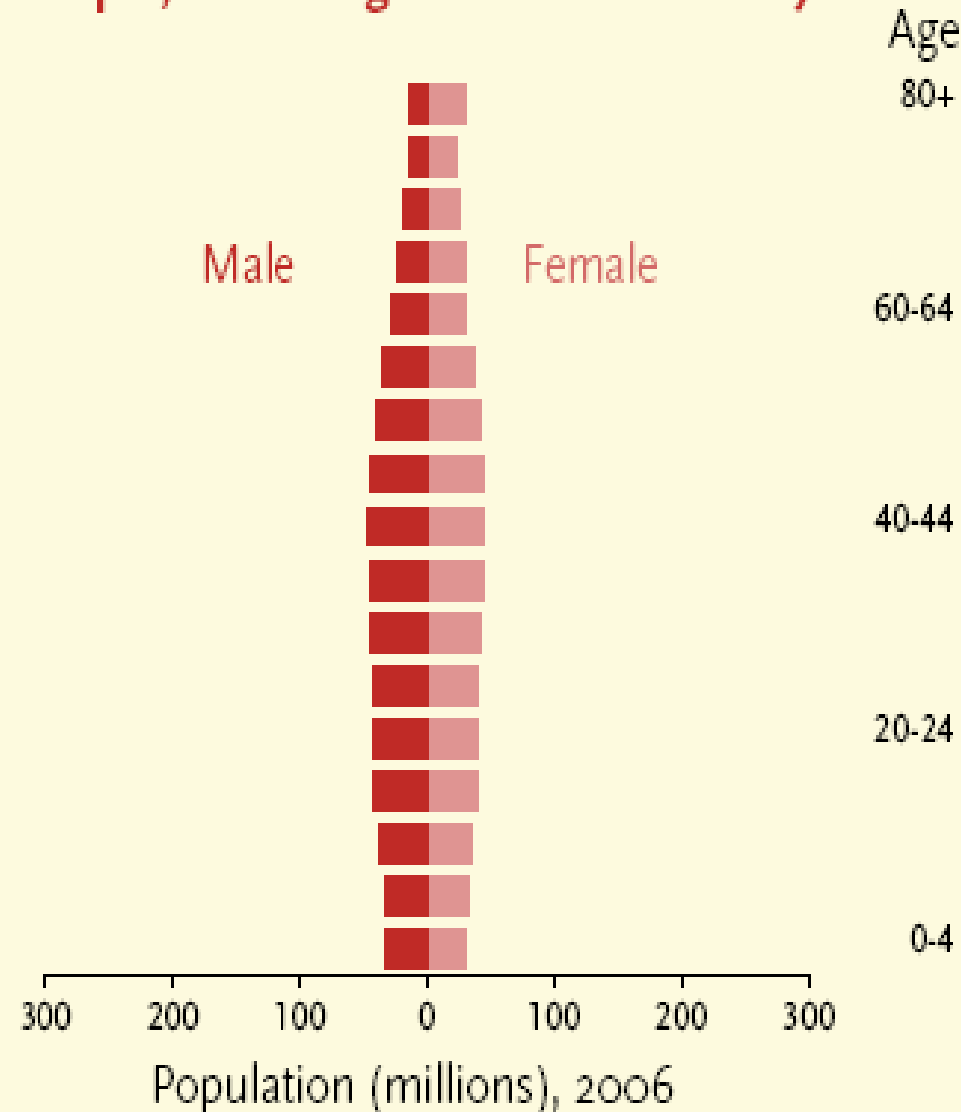
Developing Countries Have More Young People, and a Smaller Share of Elderly.

Age

80+

Male   Female

60-64

40-44

20-24

0-4

Population (millions), 2006

300   200   100   0   100   200   300

Male   Female

300   200   100   0   100   200   300

Population (millions), 2006

SOURCE: United Nations, *World Population Prospects*:

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ESTIMATED MEDIAN AGE IN SELECTED COUNTRIES, 2010 AND 2050

Legend: 2010 | 2050

Country	2010	2050
JAPAN	45	53
SOUTH KOREA	38	53
GERMANY	44	51
CHINA	35	46
BRAZIL	29	44
MEXICO	26	42
UNITED STATES	37	41

Axis: 25 YRS · 30 · 35 · 40 · 45 · 50 · 55 YRS

Source: United Nations Department of Economic and Social Affairs. 2013. World Population Prospects: 2012 Revision.

INDY/GO

ITALY BANS HUGE CRUISE SHIPS FROM VENICE CITY CENTRE

Giant cruise ships that dwarf the city have long been a bone of contention in Venice (*AFP/Getty Images*)

Ships over 55,000 tonnes will have to dock in Marghera, on the mainland

JULIA BUCKLEY
Wednesday 8 November 2017 15:50

28 shares   👍 Like   CLICK TO FOLLOW THE INDEPENDENT TRAVEL

At the end, this story is just a numbers problem," Mr. Tourtellot said. He noted that in 1960, when the jet age began, around 25 million international trips were taken. Last year, the number was 1.3 billion.
As for the cities that are the major destinations? They are "the same size they were back in 1959, and they'll probably stay that way," he said.

New York Time August 2018

The growth paradox: can tourism ever be sustainable?

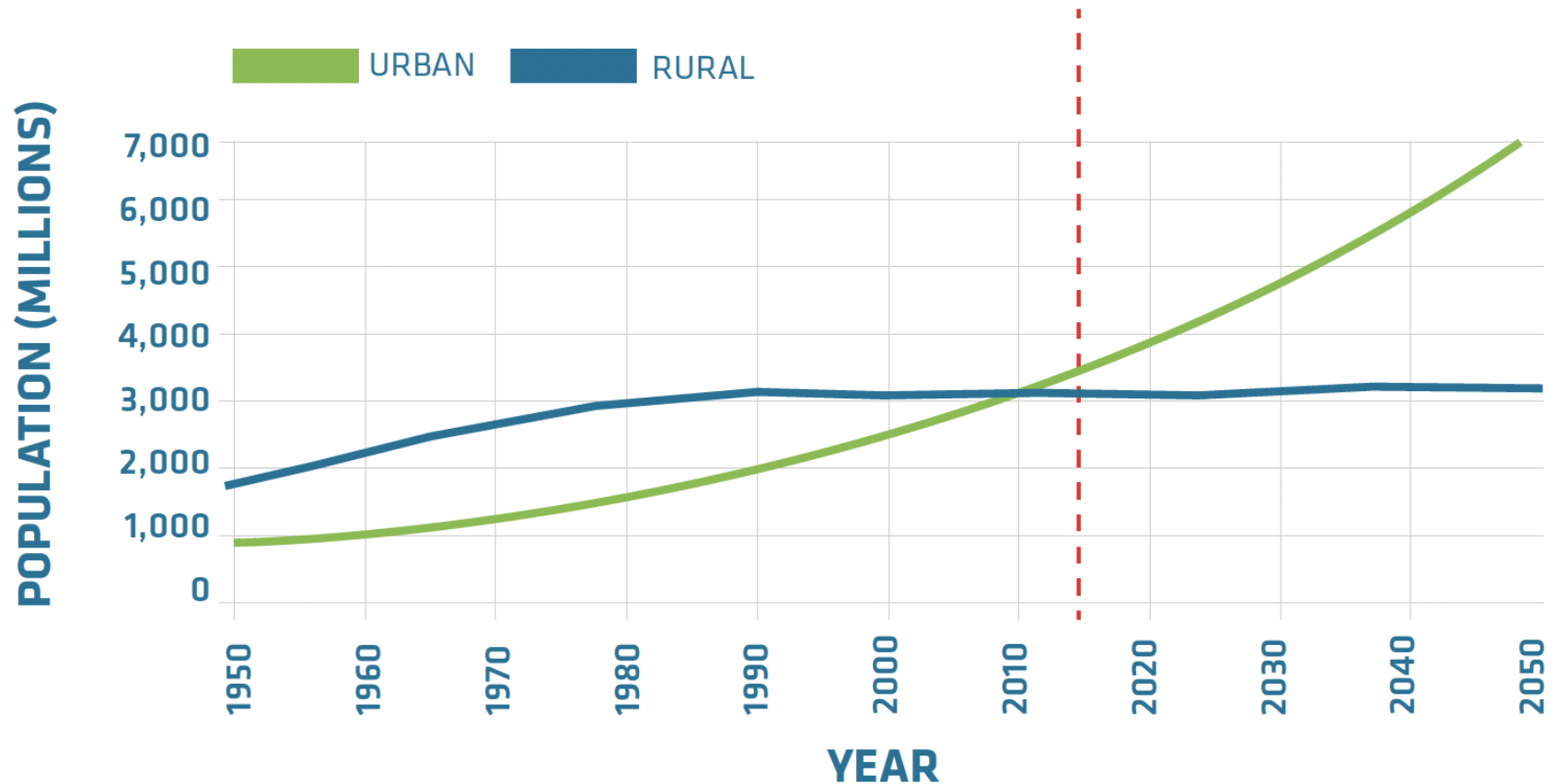'Travellers tend to arrive in increasing numbers and flock to the same locations'

Image: REUTERS/Stringer

"The urban population in 2014 accounted for 54% of the total global population, up from 34% in 1960, and continues to grow."

World Health Organization (2015)

URBAN AND RURAL POPULATION OF THE WORLD, 1950-2050

URBAN   RURAL

POPULATION (MILLIONS)

7,000
6,000
5,000
4,000
3,000
2,000
1,000
0

1950 1960 1970 1980 1990 2000 2010 2020 2030 2040 2050

YEAR

Source: United Nations, Department of Economic and Social Affairs. World Urbanization Prospects, The 2014 Revision.
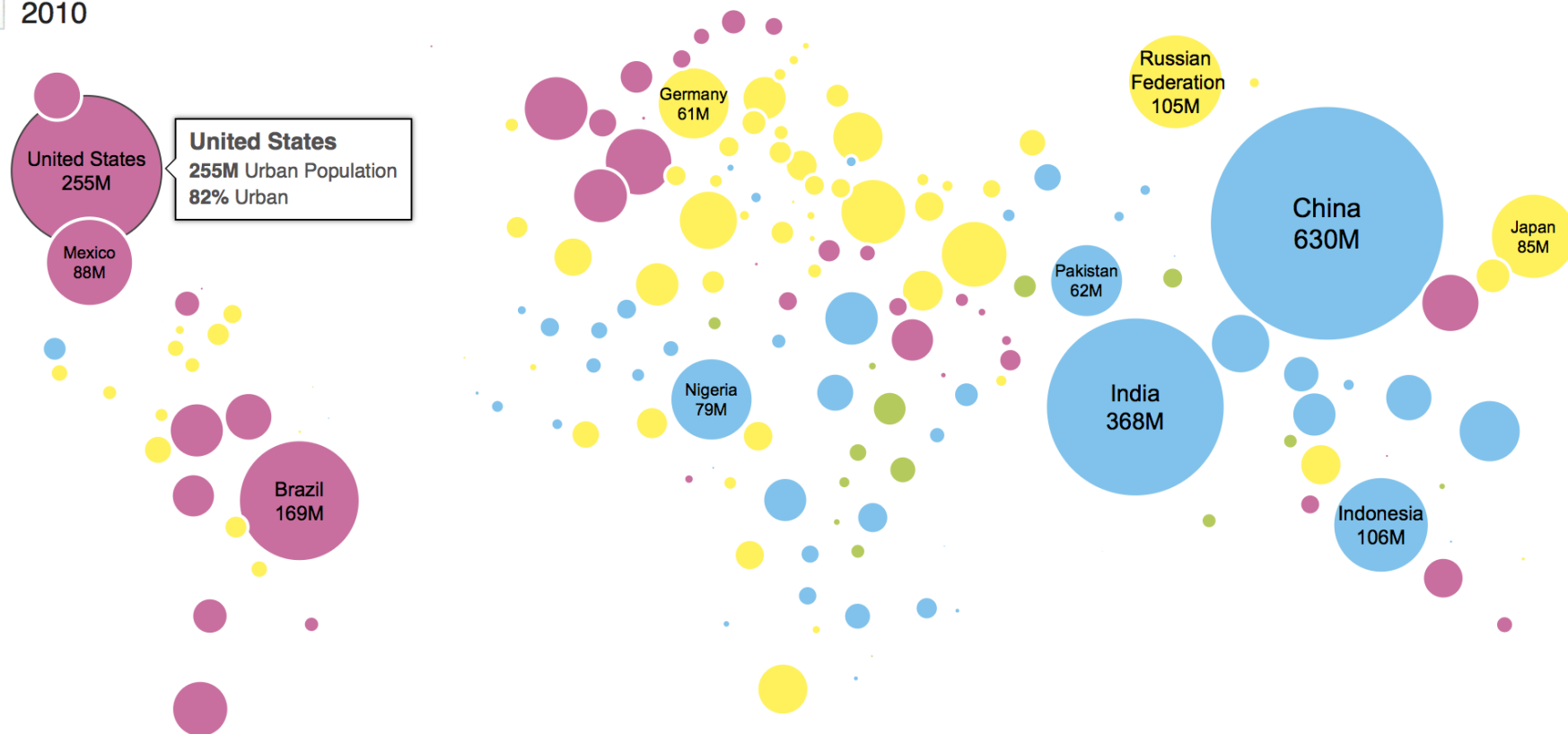
15

AN URBAN WORLD

unicef

This graphic depicts countries and territories with 2050 urban populations exceeding 100,000. Circles are scaled in proportion to urban population size. Hover over a country to see how urban it is (percentage of people living in cities and towns) and the size of its urban population (in millions).

Urban Population
- Greater than 75%
- 50% - 75%
- 25% - 50%
- Less than 25%

2010

United States
255M Urban Population
82% Urban

United States 255M
Mexico 88M
Brazil 169M
Germany 61M
Russian Federation 105M
Japan 85M
China 630M
Pakistan 62M
Nigeria 79M
India 368M
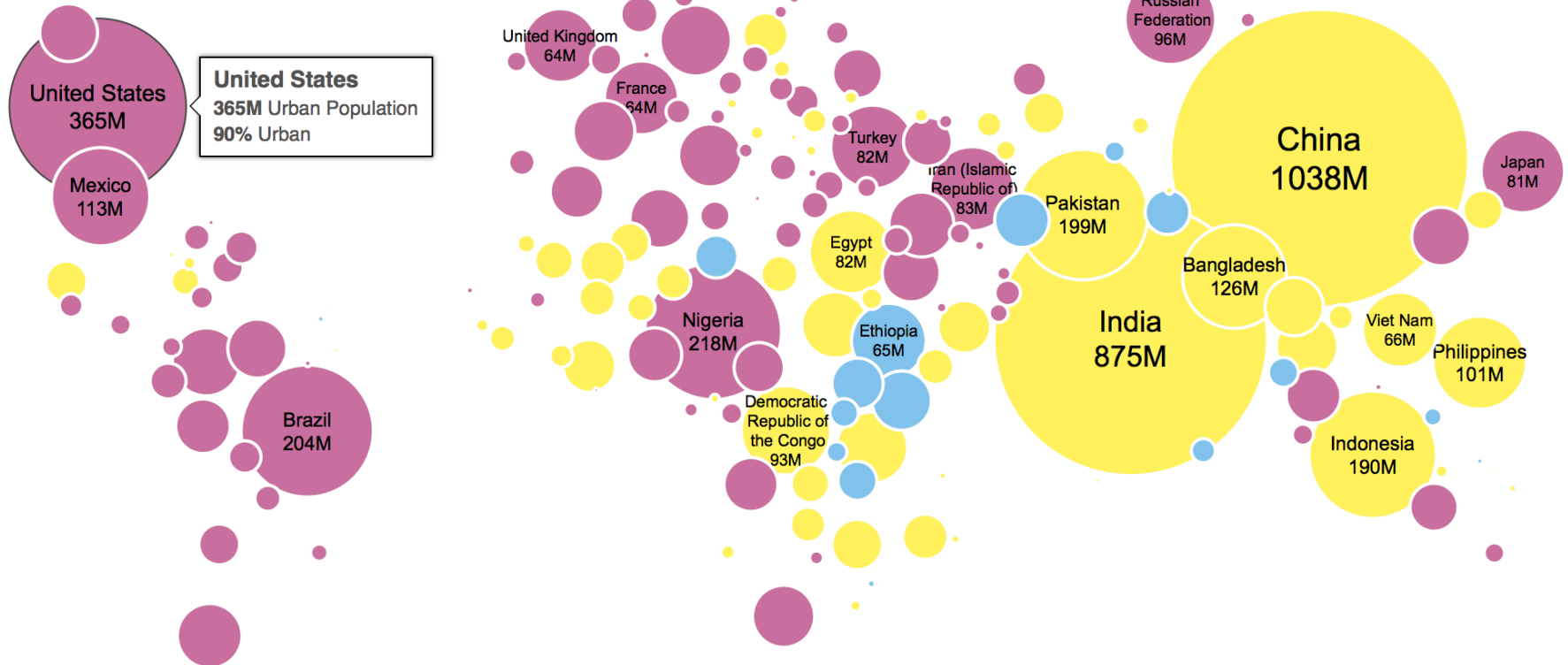Indonesia 106M

AN URBAN WORLD

unicef

This graphic depicts countries and territories with 2050 urban populations exceeding 100,000. Circles are scaled in proportion to urban population size. Hover over a country to see how urban it is (percentage of people living in cities and towns) and the size of its urban population (in millions).

Urban Population
- Greater than 75%
- 50% - 75%
- 25% - 50%
- Less than 25%

2050

United States
365M Urban Population
90% Urban

United States 365M
Mexico 113M
Brazil 204M
United Kingdom 64M
France 64M
Turkey 82M
Iran (Islamic Republic of) 83M
Egypt 82M
Nigeria 218M
Democratic Republic of the Congo 93M
Ethiopia 65M
Russian Federation 96M
China 1038M
Japan 81M
Pakistan 199M
Bangladesh 126M
India 875M
Viet Nam 66M
Philippines 101M
Indonesia 190M

Our 2019
Annual Letter

BY BILL & MELINDA GATES

We didn't see this coming

SURPRISE #3
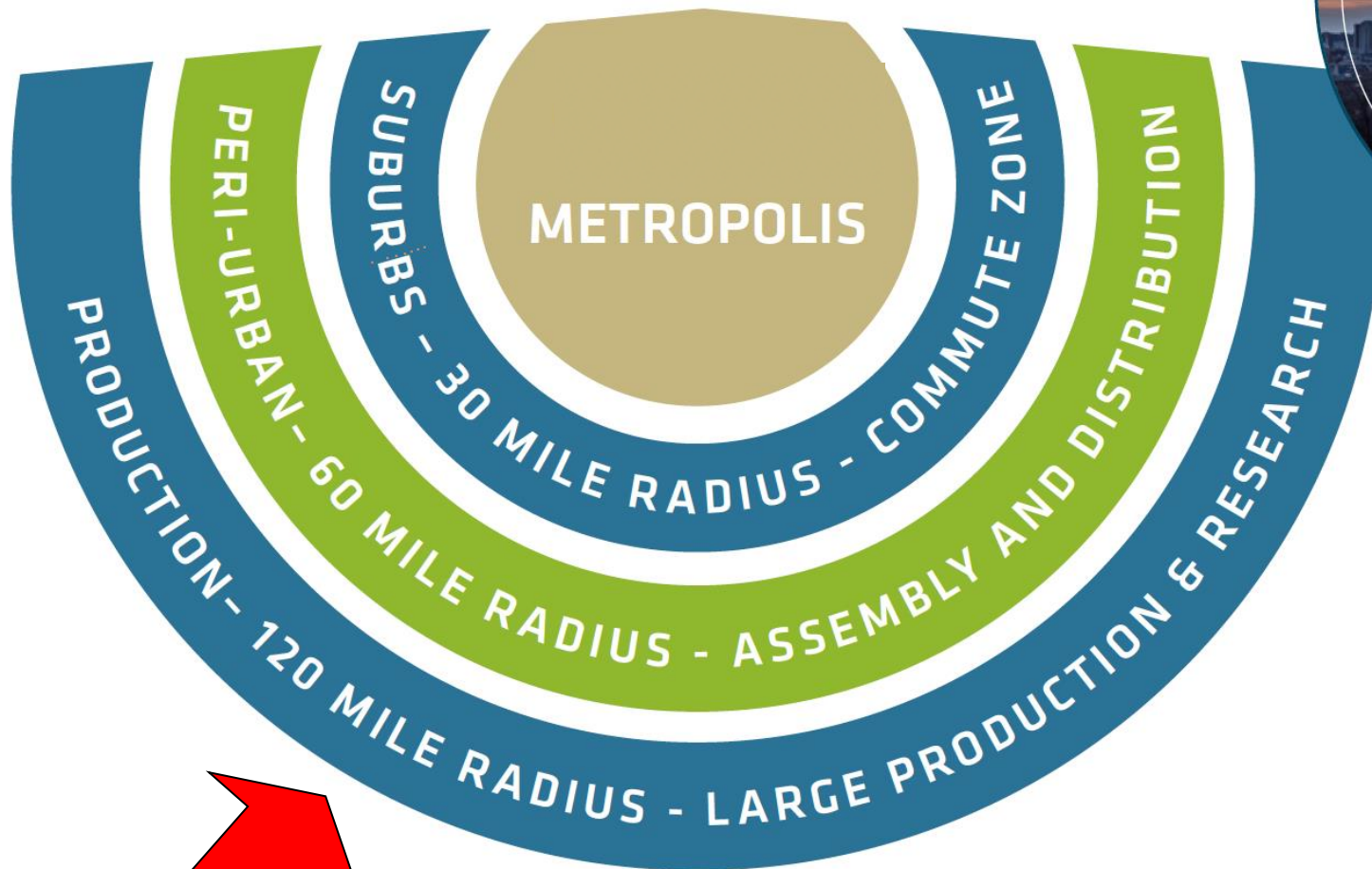
We will build an entire New York City every month...

... for 40 years! The world's building stock will double by 2060.

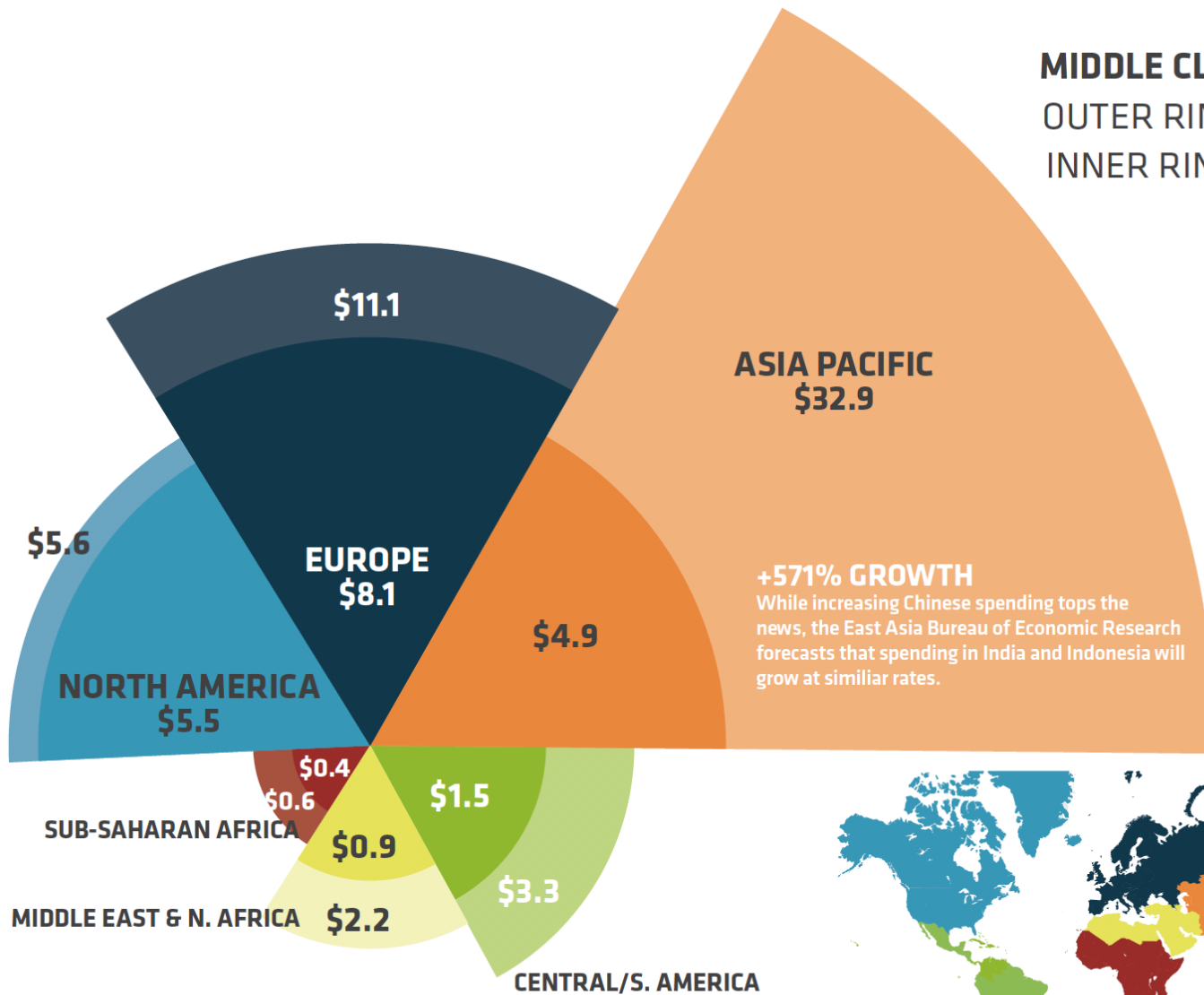# This means people will increasingly seek outdoor experiences and escape

Arc of Innovation

METROPOLIS

SUBURBS – 30 MILE RADIUS – COMMUTE ZONE

PERI-URBAN– 60 MILE RADIUS – ASSEMBLY AND DISTRIBUTION

PRODUCTION– 120 MILE RADIUS – LARGE PRODUCTION & RESEARCH

**Outdoor Recreation –
The Maine Woods**

MIDDLE CLASS CONSUMER SPENDING
OUTER RING: 2030 IN TRILLIONS, USD
INNER RING: 2009 IN TRILLIONS, USD

$11.1

ASIA PACIFIC
$32.9

$5.6

EUROPE
$8.1

$4.9

+571% GROWTH
While increasing Chinese spending tops the news, the East Asia Bureau of Economic Research forecasts that spending in India and Indonesia will grow at similiar rates.

NORTH AMERICA
$5.5

$0.4
$0.6

$1.5

SUB-SAHARAN AFRICA

$0.9

$3.3

MIDDLE EAST & N. AFRICA

$2.2

CENTRAL/S. AMERICA

Source: Kou, L. 2013. The world's middle class will number 5 billion by 2030. Quartz. Figures based on OECD, 2012. An emerging middle class.

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This means a changing visitor profile….

VISITATION TO THE U.S. BY WORLD REGION						
	Share of overseas arrivals			U.S. arrivals, thousands		
	2008	2016	2020	2008	2016	2020
Europe	50.4%	39.2%	36.4%	12,783	14,724	15,319
Asia	24.4%	30.2%	33.8%	6,179	11,347	14,247
Oceania	3.4%	4.4%	4.1%	852	1,656	1,730
Latin America & Caribbean	17.9%	21.3%	21.6%	4,531	8,023	9,108
Middle East	2.7%	3.5%	3.0%	681	1,297	1,266
Africa	1.2%	1.4%	1.4%	315	543	571
Total Overseas	100%	100%	100%	25,341	37,589	42,126

Source: U.S. Department of Commerce and Oxford Economics

Source: Fact Sheet: International Inbound Travel to the US (2016), US Travel Association.

Chart 1: Population Pyramid of the U.S.
Total Resident Population in 2015
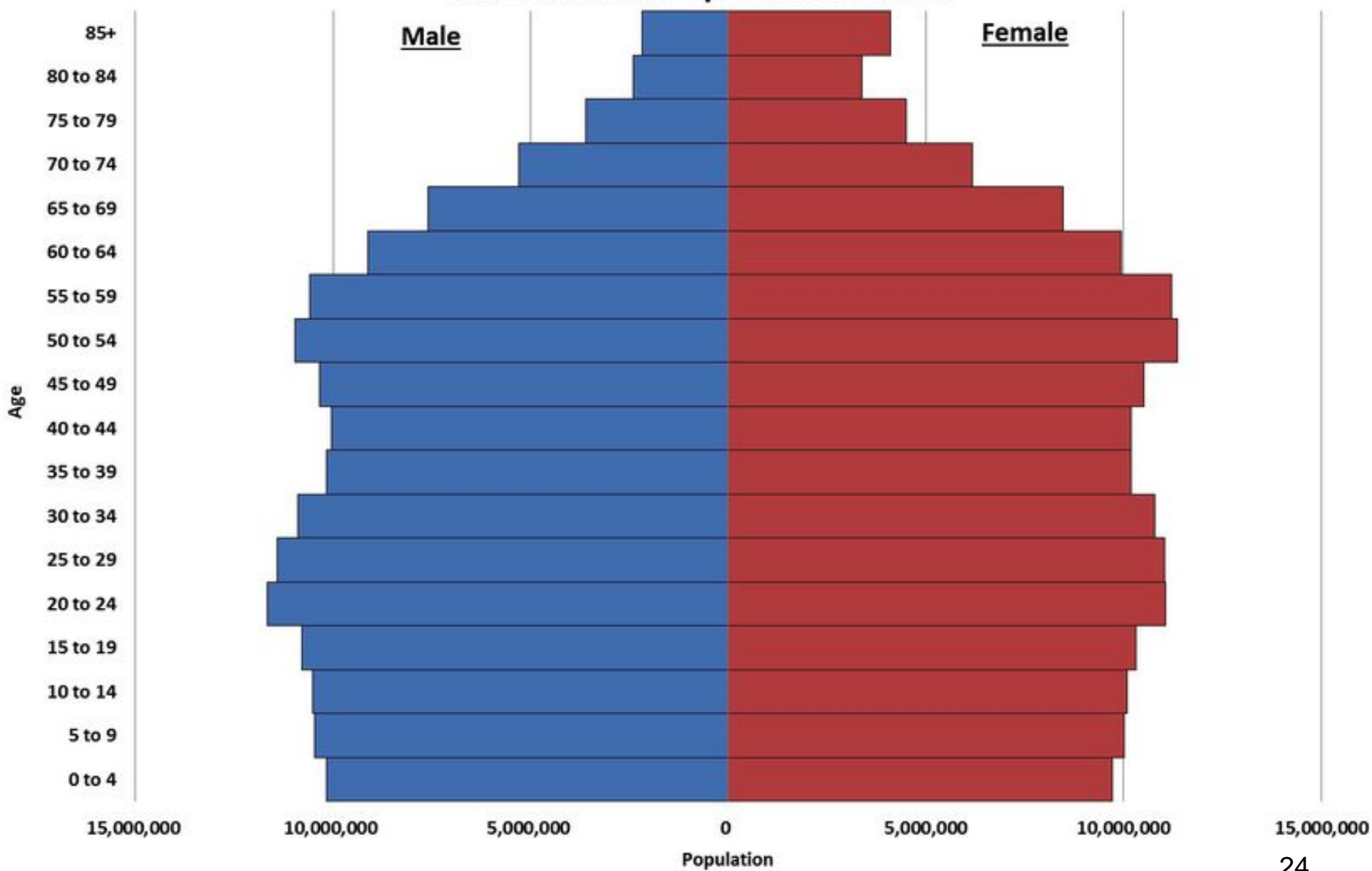
Source: U.S. Census Bureau, Vintage 2015 Population Estimates.

Blow in her face and she'll follow you anywhere.

Hit her with tangy Tipalet Cherry. Or rich, grape-y Tipalet Burgundy. Or luscious Tipalet Blueberry. It's Wild! Tipalet. It's new. Different. Delicious in taste and in aroma. A puff in her direction and she'll follow you, anywhere. Oh yes... you get smoking satisfaction without inhaling smoke.

Smokers of America, do yourself a flavor. Make your next cigarette a Tipalet.

New from Muriel.   About 5 for 25¢.

For a better start in life start COLA earlier!

How soon is too soon?

- Promotes Active Lifestyle!
- Boosts Personality!
- Gives body essential sugars!

Not soon enough. Laboratory tests over the last few years have proven that babies who start drinking soda during that early formative period have a much higher chance of gaining acceptance and "fitting in" during those awkward pre-teen and teen years. So, do yourself a favor. Do your child a favor. Start them on a strict regimen of sodas and other sugary carbonated beverages right now, for a lifetime of guaranteed happiness.

The Soda Pop Board of America
1515 W. Hart Ave. - Chicago . ILL.

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Emerging generations will have different values and expectations

#FutureOfTourism #FutureiQ

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http://www.future-iq.com

Key Emerging Tourism Trends

FUTURE OF TOURISM - THE MAINE WOODS
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future→iQ **Future of Tourism** - *The Maine Woods. Part 1: Emerging Trends – November 2018*

Emerging Tourism Trends

Experiences
Seeking new and place-based experiences such as outdoor adventure, cultural activities, and culinary opportunities.

Packages
Experiential travelers desire full day(s) with a variety of activities, often preferring to book at one time with professional services.

Sharing Economy
The sharing economy is growing throughout the industry in accommodation, transportation, meals, and booking activities.

Technology
Travelers are increasingly booking through online and mobile apps, leaving reviews and staying connected.

Peer to Peer Influence
Trip Advisor, Facebook, Snapchat and other platforms allow for immediate documentation of a trip including recommendations.

Destinations
Travelers are choosing destinations based upon culture, people and diving into the unique local feel and an authentic experience.

Sustainability
Travelers are increasing making decisions based on the impact on the local culture, environment and economy.
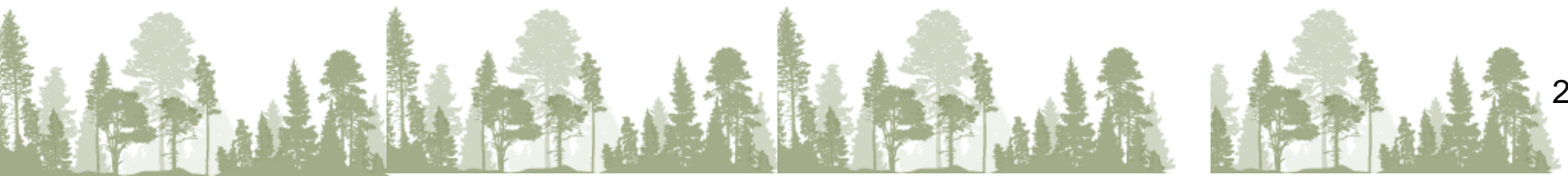
Technology

85% of leisure travellers use their smartphone while abroad

29% of travellers have used mobile apps to find flight deals

MOBILE

30% of travellers have used mobile apps to find hotel deals

INFLUENCE

52%

52% of Facebook users said their friends' photos inspired their holiday choice and travel plans

48%

Social media has a huge influence on travel bookings. Of those who used social media to research travel plans, only 48% stuck with their original plans

PASSPORT

33%
Changed their hotel

7%
Changed destination

10%
Changed resorts

5%
Changed airlines

TRUST

70%

of consumers say they trust earned media, such as word-of-mouth and recommendations from friends and family, above all other forms of advertising.

70%

of global consumers say online consumer reviews are the second most trusted form of advertising

Source: The Impact of Social Media Within The Hospitality Industry. www.four-pillars.co.uk

Culinary

55% Are motivated by the search for authenticity

63% Of travelers take and share pictures of food

Not just about Michelin Star restaurants

Rise of Slow Food Movement

22% Food tourism promotion done online

35-50% Travel budget spent on food

Want to participate and learn something new

Prefer to combine culinary & cultural or natural activities

Source: Travelshift.com, 2016. The Gap In The Market – Food Tourism tourism.

How do we create sustainable tourism?

WHAT IS SUSTAINABLE TOURISM?

Respecting and enhancing the heritage, culture, traditions, and distinctiveness of communities
82%

A commitment to preserve a destination's authenticity and not become too "touristy"
71%

Increasing the number and quality of local jobs supported by tourism
70%

Engaging residents in deciding the role of tourism in their communities
64%

% Selecting Attribute as Meaning of Sustainability

The Sustainable Traveler

VS

All Other Travelers

Significantly more sustainable travelers purchase something from a travel company because that company engages in sustainable practices, like:

Offer authentic experiences — **57%** / **22%**

Buy local — **54%** / **17%**

Educate customers — **54%** / **17%**

Sustainable travelers are significantly more likely to stay 7 or more days, whereas the most recent trip of all others was less than 3 days.

7+ VS **<3**

Sustainable travelers are far more likely to travel with friends than all others.

4 Adults & 1 Child VS 3 Adults & 1 Child

An analysis of tourism industry trends highlights the need to be adaptable and responsive to the evolution of travel markets and travelers. With effort and organization, the Maine Woods can leverage the region's assets to attract new visitors, and provide substantial economic benefits.

What destination development and marketing is needed to position the Maine Woods region as an attractive destination for the growing global tourism industry?

Scenarios of the future – finding the sweet spot
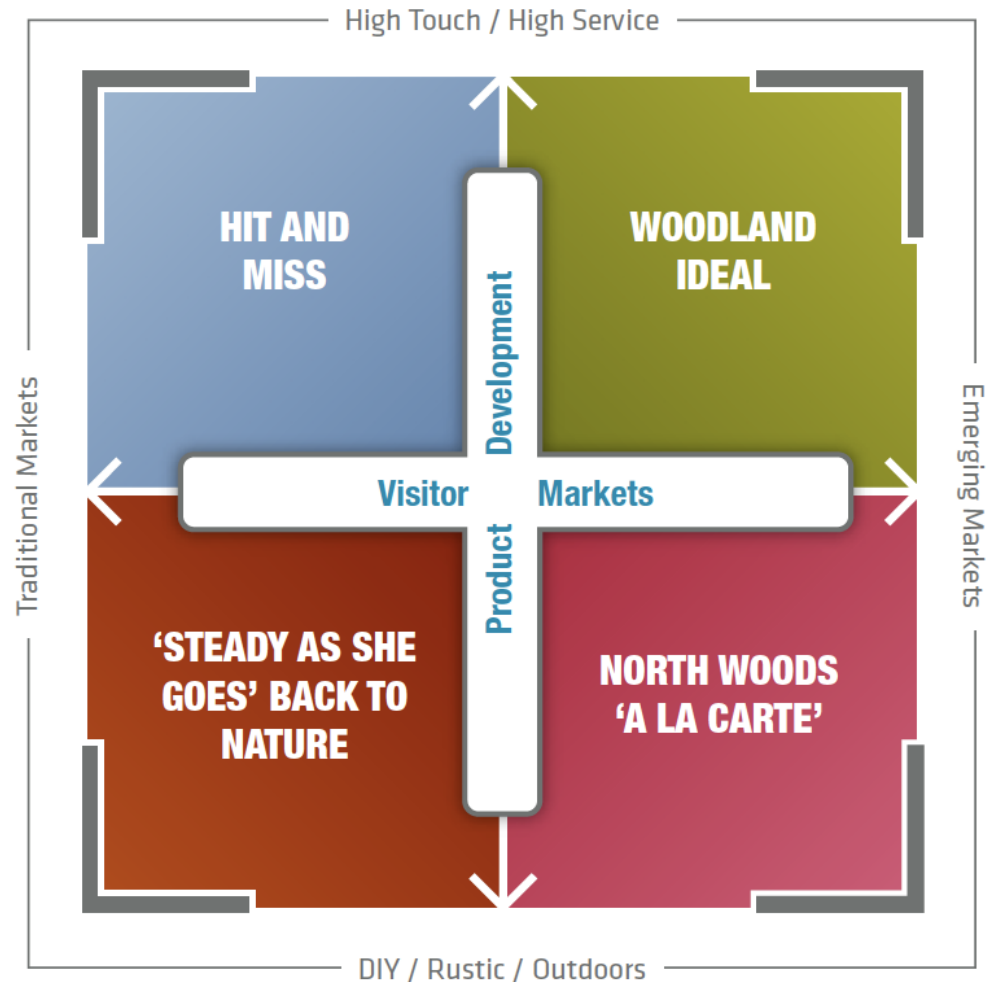
Questions?

Sustainable Tourism Definition

- Is *integrated with our local communities* in a way that is respectful of our diverse heritage and culture;

- Provides visitors with *authentic, place-based, educational experiences* that leave them feeling enriched and inspired;

- Creates *lasting financial and social benefits* for local residents, businesses, and communities across our County;

- Is supported by public policies *with organizational support and funding*; and,